

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

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Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Serena Li

Employing Office/Committee: office of Senator Brian Schatz

Travel Expenses Paid by (List all sources): Partnership for a Secure America

Travel Date(s): July 21-22, 2018

Description/Title of Attached Forms: ① private sponsor travel certification form


② congressional partnership program, summer 2018, senate

③ congressional partnership program retreat summer 2018

Purpose of Amendment (describe the reason for amending original submission):

some of forms submitted after Partnership for a Secure America (PSA)
trip to Airlie Conference Center were incorrect.

2/27/2019
(Date)


(Signature of Traveler)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Partnership for a Secure America
2. Description of the trip: Congressional staff weekend of foreign policy and national security lectures.
3. Dates of travel: July 21-22, 2018
4. Place of travel: Airlie Conference Center, Warrenton, VA
5. Name and title of Senate invitees: See Attached List
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - ~~OR~~
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - ~~AND~~
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - ~~AND~~
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

OR

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) is solely responsible for planing and conducting this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring together staff from both parties to build cross-party relationships and discuss diverse perspectives on pressing issues in the national security and foreign policy arena.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This will be the nineteenth such strip of this nature.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics. These statements are generally available to the public.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$35 (Coach Bus)	\$90 (For One Night)	\$77 (For 2 days)	\$191 conference services (over 2 days). This includes cost of breakout room, AV equipment, and incidental snacks/refreshments.

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

It is close to Washington, DC, but also provides a remote setting that will encourage participants to step outside their daily roles as Senate staff.

19. Name and location of hotel or other lodging facility:

Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington, DC for a one night trip. The lodging and conference location is all the same.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meals and lodging are below the per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will be transported by a chartered coach class bus round trip from Union Station.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Name and Title: Nathan Sermonis, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1629 K Street NW, Suite 450, Washington, DC 20006

Telephone Number: (202) 293-8580

Fax Number: N/A

E-mail Address: sermonis@psaonline.org



All invited congressional staff members handle foreign policy and national security topics in their professional office capacity.

Legislative Director
Sen. Mike Crapo
(R-ID)

Military Legislative Assistant
Sen. Tom Udall
(D-NM)

Legislative Correspondent
Sen. Brian Schatz
(D-HI)

Legislative Correspondent
Sen. David Perdue
(R-GA)

**Defense Legislative Fellow
Sen. Richard Blumenthal
(D-CT)**

**Legislative Correspondent
Sen. Doug Jones
(D-AL)**

Deputy Chief Counsel
Senate Committee on Homeland
Security and Governmental Affairs

**Legislative Correspondent
Sen. Tammy Duckworth
(D-IL)**

Legislative Correspondent
Sen. Lisa Murkowski
(R-AK)

Legislative Correspondent
Sen. Jeff Flake
(R-AZ)

SECRET



Congressional Partnership Program Retreat Summer 2018

Saturday, July 21st

1:30 pm

Depart from Union Station, Washington, DC

3:00 – 4:00 pm

Arrive at Airlie Conference Center & Check-in

4:00 – 5:00 pm

Material Review and Preparation

5:00 – 5:30 pm

Opening Remarks and Review of Agenda:
Nathan Sermonis, PSA

Nathan Sermonis will outline retreat agenda, provide logistical information for the weekend (i.e. location of restrooms, where to store luggage, etc.), and all attendees will introduce themselves.

5:30 – 7:00 pm

Airlie House – Meadow Room

Guest Speakers: Lara Flint, former Chief Counsel for Sen. Patrick Leahy

Topic: Discussion on the USA Freedom Act of 2015

Discussion will cover the specifics of how a bipartisan Congressional staff group negotiated the language and contents of the USA Freedom Act of 2015, a law that restored in modified form several provisions of the Patriot Act.

7:00 – 7:30 pm

Federal Room

Pre-Dinner Reception

Informal conversations with guest speakers

Attendees will have an opportunity to informally speak with the Lara Flint and Amb. Ron Neumann.



Congressional Partnership Program Retreat Summer 2018

7:30 – 9:00 pm

Federal Room

Keynote Dinner

Guest Speaker: Amb. Ron Neumann, former Deputy Assistant Secretary of State and Ambassador to Afghanistan, Bahrain, and Algeria

Topic: Global Challenges for Today and Tomorrow

Amb. Neumann will address the national security and foreign policy challenges he deems most critical in the short and long term.

9:00 – 10:00 pm

Federal Room

After-Dinner Reception

Informal conversations with guest speakers

Attendees will have an opportunity to informally speak with the Lara Flint and Amb. Ron Neumann.

Sunday, July 22nd

Between 8:00 – 9:00 am

Airlie House – Dining Room

Breakfast

9:00 – 12:00 pm

Group A

Airlie House – Meadow Room

National Security Council Simulation

National Security Advisor: Mr. Robert Sheldon,
Head of Technology Strategy for Public Sector at
CrowdStrike



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Participants will engage in a simulation where they are asked to negotiate a solution to a hypothetical foreign policy crisis.

9:00 – 10:30 am

Group B

Airlie House – Jefferson Room

Guest Speaker: Ambassador Frank Wisner, former Undersecretary of State for International Security Affairs & Ambassador Cameron Munter, former Ambassador to Pakistan and Serbia

Topic: Challenges Facing the Western Balkans

Amb. Wisner and Amb. Munter will discuss pressing issues including internal governance, economic challenges, and how to prevent potential conflict in the Western Balkans.

10:30 – 12:00 pm

Group B

Airlie House – Jefferson Room

Guest Speaker: Ambassador Maura Connelly, former Ambassador to Lebanon and *Chargé d’Affaires* to Syria

Topic: Syria’s Future

Amb. Connelly will discuss the conflict in Syria, counter-ISIS activities, and ideas for resolving the ongoing civil war.

12:00 – 1:00 pm

Airlie House – Dining Room

Lunch

1:00 – 2:00 pm

Informal conversations with guest speakers

2:00 – 5:00 pm

Group B

Airlie House – Meadow Room



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Congressional Partnership Program Retreat Summer 2018

National Security Council Simulation

National Security Advisor: Mr. Robert Sheldon,
Head of Technology Strategy for Public Sector at
CrowdStrike

Participants will engage in a simulation where
they are asked to negotiate a solution to a
hypothetical foreign policy crisis.

2:00 – 3:30 pm

Group A

Airlie House – Jefferson Room

Guest Speaker: Ambassador Frank Wisner,
former Undersecretary of State for International
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former Ambassador to Pakistan and Serbia

Topic: Challenges Facing the Western Balkans

Amb. Wisner and Amb. Munter will discuss
pressing issues including internal governance,
economic challenges, and how to prevent
potential conflict in the Western Balkans.

3:30 – 5:00 pm

Group A

Airlie House – Jefferson Room

Guest Speaker: Ambassador Maura Connelly,
former Ambassador to Lebanon and *Chargé
d’Affaires* to Syria

Topic: Syria’s Future

Amb. Connelly will discuss the conflict in Syria,
counter-ISIS activities, and ideas for resolving the
ongoing civil war.



5:00 – 5:30 pm

Airlie House – Meadow Room

Wrap-up and Departure from Airlie

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